# CATALOGING RULES FOR THE DESCRIPTION OF LOOSELEAF PUBLICATIONS

OFFICE FOR
DESCRIPTIVE
CATALOGING
POLICY

CATALOGING DISTRIBUTION SERVICE, LIBRARY OF CONGRESS

# CATALOGING RULES FOR THE DESCRIPTION OF LOOSELEAF PUBLICATIONS

## WITH SPECIAL EMPHASIS ON LEGAL MATERIALS

**2nd Edition**

By Adele Hallam
Senior Descriptive Cataloging Specialist

Office for Descriptive Cataloging, Library of Congress
Washington, D.C. 1989

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It is unlikely that I have dealt adequately with every aspect or that I have avoided all errors. For these faults I accept sole responsibility.

Adele Pihl Hallam

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# Introduction

## PRELIMINARY NOTES

In considering "looseleaf" it is first of all necessary to distinguish between publications that are merely issued in looseleaf format[1] and those that are issued in this format for the specific purposes of updating. The present document deals only with the latter type, which is called "looseleaf for updating."

"Looseleaf for updating" is defined as a mode of publication in which the material is published on separate, usually perforated pages in special binders; the pages can be easily inserted, removed, and substituted. This physical feature allows a publisher to update the text through continuing edition, introducing what is new, and removing what is superseded. Publications in this category are single or multivolume monographs, or they may be serials (see Library of Congress Rule Interpretation (LCRI) 12.0A: Cataloging Service Bulletin, (CSB) no. 44 (spring 1989), an excerpt of which is given on page 3 below). No matter whether the bibliographic condition is serial or monographic, all such looseleaf publications are continually updated. A clear majority of these is in the field of law. The particular method of updating varies from publisher to publisher, and sometimes there is no uniform practice within the output of a single publisher. Looseleaf publications in specific subject areas containing both primary and secondary source material are frequently referred to as "looseleaf services."

The greatest advantage of a looseleaf publication is its capacity to disseminate up-to-date information. Such dissemination, however, may also greatly affect the bibliographic record, for it is often necessary to adjust the bibliographic record to reflect updates to the publication, especially when such updates result in changes or substitutions in relation to the title page or another comparable source (e.g., the binder).

Several phenomena associated with looseleaf publications create a measure of confusion: The updates, which, depending on the subject matter and the frequency of revision, may vary from a single page to hundreds of pages, are usually called "releases" or "supplements" and are generally numbered, e.g., "Release 58, Jan. 1986." The identification of the updates is often on a special sheet or on a wrapper with instructions for interfiling. The updates once interfiled lose any identification as a unit, e.g., as "Release 58" per se. The wrapper is discarded, but the instructions-for-filing sheet is usually kept for control purposes. The numbering system is of no use to the patron and has no other purpose than that of assuring the purchaser that all updates have been received. A new title page is issued frequently (because of new material having been newly copyrighted) along with instruc

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[1]The Library of Congress bibliographic record for these publications does not give an explicit indication of the looseleaf format except indirectly in the qualification to any ISBN assigned.

To minimize removal of pages, such items are often bound/rebound in the Library of Congress rather than being kept in their original binders as looseleaf.

tions to discard the previous one. A new title page is issued also when a change in title or authorship, editorship, etc., occurs (with instructions to discard the previous one).

The phenomenon of replacement title pages needs some elaboration, for it occurs frequently and is unique to looseleaf publications. As stated above, the title page of a looseleaf publication can be, and often is, a nonpermanent feature. A new title page supersedes the previous one, which is to be discarded. Some libraries retain the superseded title pages for bibliographic history; the Library of Congress does not retain them at all. In spite of the substitution of title pages, the cataloger's task is to create a single bibliographic record, not an endless succession of records for nonexistent "related editions."

**LIBRARY OF CONGRESS TREATMENT OF "LOOSELEAF FOR UPDATING"**

One of the first specific questions that arises with looseleaf publications is whether they should be cataloged as monographs or as serials. (One could look at the "releases," "supplements," etc., as constituting the issues of a serial.) After carefully considering whether the bibliographic description for looseleaf publications should follow that of monographs or serials, the Library of Congress concluded that by the strict definitions of a monograph and a serial, looseleaf publications constitute neither; instead, their unique characteristics need to be considered outside established cataloging formulae.

Cataloging looseleaf publications as serials was rejected for three basic reasons, all of which derive from the premises of serial cataloging:

1. Earliest issue. According to the rules for serials, the cataloging is done from the earliest issue; this is unworkable in a situation in which the chief source is continually being discarded because it is superseded.

2. Successive entry. The practice of successive entry cataloging, which is presently basic to serials, cannot apply. Even though the title may change, the result is not two publications with different titles. Instead, a change in title is accompanied by replacement pages to be interfiled. Once the interfiling has occurred, the result is not two separate publications; rather, it is one publication embodying pages both from the "original" and "replacements" but interfiled in one publication.

3. Updates: "Releases," "Supplements," etc. Even if other basic requirements for serial treatment were met, only the updates, not the basic work, could be considered a serial because the basic work lacks a numeric or chronological designation, a basic characteristic of a serial. (N.B. The updates are also not usable apart from their presence within the basic work, so that although they might be checked in separately, as issues of a serial are, they could not be

used separately.)

The conclusion here is that normally looseleaf publications per se are not serials. There are a very few genuinely serial publications that are looseleaf. For details, consult LCRI 12.0A (CSB, no. 44 (spring 1989), an excerpt of which is reproduced below:

**Catalog as serials**

1. Publications meeting the definition of serials but issued in loose-leaf form simply to allow issues to be stored in a binder.

   This category includes publications whose successive issues consist of parts which may be filed into separate sections of a binder but which do not replace parts already present (e.g., a monthly publication listing recalled products; each monthly issue consists of separately designated sheets to be filed into an annual binder divided into various product categories).

2. Publications that consist of a basic binder or set of binders which are issued periodically (usually annually or biennially) and carry corresponding designations. Loose-leaf updates are issued in between the periodic editions of the basic volume(s) (e.g., a 1979 volume, plus quarterly updates to be interfiled; 1980, plus quarterly updates to be interfiled, etc.)

**Catalog as monographs**

1. Publications consisting of a loose-leaf binder or finite number of binders to which new or replacement pages are added periodically.

   Do not catalog as serials any of the updates, revised pages, or supplements to these publications, even though these updates, etc., are frequently issued in packages containing a numeric or chronological designation suggestive of serial publications. Also do not catalog as serials serial-like sections of such publications even if they carry independent numeric or chronological designations and separate titles such as bulletin, newsletter, report bulletin, etc.

2. Generally do not catalog as a serial loose-leaf material of permanent value (e.g., court decisions) that constitutes a section of a loose-leaf publication and that at the end of the year or from time to time is transferred from the loose-leaf binder to a permanent binder, or is sent by the publisher to the subscriber in a permanent volume that contains the material previously received in loose-leaf format. (Access to the special section and the transfer volumes is provided by a title added entry on the bibliographic record for the loose-leaf.)

Although judged not to be serials, it does not follow that looseleaf publications must therefore be monographs. (One needs only to consider such differences as the choice of title proper when the title changes or the transcription of the date of publication or of copyright which is likely to change with each replacement page.) Nevertheless, because the bibliographic description applied to looseleaf publications follows so closely that of monographs, the Library of Congress catalogs looseleaf publications as monographs (except for the few serials mentioned above) and includes the records for them in that portion of its machine catalog allocated to books (called the BOOKSM file).

## 0. GENERAL RULES

### 0A. Objectives and principles of presentation

#### 0A1. Objectives

These guidelines must be seen as supplementary to the Anglo-American Cataloguing Rules, 2nd edition, 1988 revision (AACR 2). For easier reference, the arrangement of the guidelines follows as much as possible that of chapters 1 and 2 of AACR 2, 1988 revision. Where it has been thought that additional information may be helpful to catalogers new to the field, background information has been included in the form of preliminary notes ("preambles").

It is expected that the present text will undergo further revision as new situations are met and experience is gained. Comments from other institutions are welcomed.

The objectives of the guidelines are:

1) to take into account the special characteristics unique to looseleaf publications and to treat them bibliographically in their own right;

2) to provide guidance for bibliographic description that:

a) can be applied widely and extensively by users of LC cataloging and by contributors to shared databases;

b) results in catalog records that can be incorporated into catalogs regardless of whether the records are prepared locally, nationally, or internationally;

c) results in a catalog record for a particular publication that can be used widely, taking into account the fact that different libraries may hold different components of a publication or may acquire a particular publication at different times in the life of that publication.

0A2. Principles of presentation of data in the bibliographic record. To accomplish the above-mentioned objectives it is necessary to apply the basic premise that when any changes occur other than in the date of publication, the latest title page or its substitute is used as the basis for either the original preparation or the later update of the bibliographic record for the publication. (Exception: The transcription of the earliest or earliest known date of publication, etc., is mandated for the reason that the transcription of a later date would result in the creation of separate bibliographic records for artificial "editions" when these are actually the same publication in different stages of updating either within the same institution or in different institutions (see 4F Preamble)). This means that the bibliographic record may reflect one or more title pages--due to their changeable nature.

## 0B. The basic description

**0B1.** The description must always include the following elements, regardless of the completeness of the information available: title proper, place of publication or distribution, publisher or distributor, date of publication or distribution, extent of item, dimension of item. Also include other elements of description as set out in the following rules whenever they are available.

**0B2.** In general, with the exception of date of publication, base the description on the latest item in hand. If the required components of the description are not available from the prescribed sources for each of the components, take the necessary information from any available source, whether this be a reference work or the content of the looseleaf publication itself. Give in a note the source of any component of the description not taken from a prescribed source.

## 0C. Chief source of information (title page)

**0C1.** With the exception noted in 0B2 above, the chief source of information for a publication is the latest title page, or, if there is no title page, the source from within the publication that is used as a substitute for it. If information traditionally given on the title page is given on two facing pages or on pages on successive leaves, with or without repetition, treat these pages as the title page.

**0C2.** If the publication has more than one title page, choose one as the basis of the description according to the following guidelines, applying the first applicable criterion.

a) If the title pages present the publication in different aspect (e.g., as an individual item and as part of a multipart item), prefer the one that corresponds to the aspect in which the publication is to be treated.

b) If the publication is in more than one volume, each of which has a title page, use the title page that, with the exception of date of publication, reflects the latest information.

c) If the publication has title pages in more than one language or script, choose the title page that is in the language or script of the main part of the publication.

## 0D. Prescribed sources of information

The description is divided into areas and each area is divided into a number of elements as set out in the particular rules. For each area of description certain sources of information are specially indicated (see the listing below), which, for the sole purpose of applying the convention of bracketing, are designated "prescribed sources." (For the preferred order of

sources of information, see the particular rules for each area.) Transcription of data from other sources is possible, depending on the particular rules; such data are enclosed within square brackets unless specifically indicated otherwise in the relevant rule.

| Area | Prescribed Sources of Information |
|---|---|
| Title and statement of responsibility | Latest title page |
| Edition | Latest title page, latest other preliminaries, and latest colophon |
| Publication, distribution, etc. | Latest title page, latest other preliminaries, and latest colophon |
| Date of publication, distribution, etc. | Earliest title page, earliest other preliminaries, and earliest colophon |
| Physical description | The whole publication |
| Series | The whole publication |
| Notes | Any source |
| Standard number | Any source |

**0E. Punctuation**

Precede each area other than the first by a period-space-dash-space (. -- ) unless the area begins a new paragraph.

Precede or enclose each occurrence of an element of an area with standard punctuation as prescribed in these rules.

Precede each mark of prescribed punctuation by a space and follow it by a space, except for the comma, period, and opening and closing parentheses and square brackets. The comma, period, and closing parentheses and square bracket are not preceded by a space; the hyphen and the opening parentheses and square bracket are not followed by a space.

Precede the first element of each area, other than the first element of the first area or the first element of an area beginning a new paragraph, by a period-space-dash-space. If paragraphing is used, end paragraphs with normal punctuation (usually a period).

Indicate an interpolation (i.e., data taken from outside the prescribed source(s) of information) by enclosing it in square brackets. Indicate a conjectural interpolation by adding a question mark within the square brackets.

Indicate the omission of part of an element by the mark of omission (...). Precede and follow the mark of omission by a space. Omit any area or element that does not apply in describing an individual item; also omit its prescribed preceding or enclosing punctuation. Do not indicate the omission of an area or element by the mark of omission. If the mark of omission precedes a period, omit the period, even if it is prescribed punctuation.

[title] ... -- [edition statement]

Do not transcribe the punctuation marks ... or [ ]; replace them by -- and ( ), respectively.

When adjacent elements within one area are to be enclosed in square brackets, enclose them in one set of square brackets.

[New York : Bender], 1980-

When adjacent elements are in different areas, enclose each element in a set of square brackets.

[2nd ed.]. -- [Chicago, Ill.] : Commerce Clearing House

When an element of description ends with an abbreviation or other word or character followed by a period, and the prescribed punctuation following that element is a period, do not give the period indicating abbreviation, etc.

1 v. (loose-leaf) ; 29 cm. -- (Business law monographs ; 8)
not 1 v. (loose-leaf) ; 29 cm.. -- (Business law monographs ; 8)

**0F. Language and script of the description**

In the following areas, give information transcribed from the publication itself in the language and script (wherever practicable) in which it appears there:

Title and statement of responsibility
Edition
Publication, distribution, etc.
Series

Replace symbols or other matter that cannot be reproduced by the typographical facilities available[2] with a cataloger's description in square brackets. Make an explanatory note if necessary.

---

[2]At the Library of Congress, the typographical facilities referred to here and in succeeding rules include those characters available in the MARC character set. See also LCRI 1.0E.

In general, give interpolations into these areas in the language and script of the other data in the area. Exceptions to this are:

1) prescribed interpolations and abbreviations;
2) other forms of the place of publication (see 4C);
3) statements of function of the publisher, distributor, etc. (see 4E).

If other data in these areas are romanized, give interpolations according to the same romanization.

Give any other element (other than titles and quotations in notes) in the language of the cataloging agency.

**0G. Misprints, etc.**

Transcribe a misprint as it appears in the publication. Follow such an inaccuracy either by "[sic]" or by the abbreviation "i.e." and the correction within square brackets. Supply a missing letter or letters in square brackets.

If a later title page, received after the publication was initially cataloged, or in the case of multivolume publications, the title page of another volume, has the misprint corrected, update the record by transcribing the correct data only. In such cases ignore the misprint, i.e., do not mention it in a note.

**0H. Accents and other diacritical marks**

Add accents and other diacritical marks that are not present in the data found in the source of information in accordance with the usage of the language used in the context.

**0J. Abbreviations**

In transcription, do not abbreviate any word unless the particular rule for the element or area requires it.

**0K. Initials, etc.**

Record initials, initialisms, and acronyms without internal spaces, regardless of how they are presented in the source of information. Apply this provision also whether or not these elements are presented with periods.

A.K. Hall
New York, N.Y.

Treat an abbreviation consisting of more than a single letter as if it were a distinct word, separating it with a space from preceding and succeeding words or initials.

Ph. D.
Dr. jur.

If two or more distinct initialisms (or sets of initials), acronyms, or abbreviations appear in juxtaposition, separate each from the other with a space.

U.S. G.P.O.
Dr. h. c.

**0L. Items with several chief sources of information**

Describe each element and area according to rules 1A-6J, each of which provides guidance regarding sources of information.

## 1. TITLE AND STATEMENT OF RESPONSIBILITY AREA

Contents:
1A. Preliminary rule
1B. Title proper
1C. General material designation
1D. Parallel titles
1E. Other title information
1F. Statements of responsibility
1G. Items without a collective title

### 1A. Preliminary rule

#### 1A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Precede the title of a supplement or section (see 1B9) by a period.
Precede each parallel title by an equals sign.
Precede each unit of other title information by a colon.
Precede the first statement of responsibility by a diagonal slash.
Precede each subsequent statement of responsibility by a semicolon.

For the punctuation of this area when a publication has no collective title, see 1G.

For the use of the equals sign to precede parallel statements, see the appropriate rules following.

**1A2. Sources of information.** Take information recorded in this area from the latest chief source. Enclose information supplied from any other source in square brackets.

If the chief sources present the publication in different aspects (e.g., as an individual item and as a part of a multipart item), prefer the one that corresponds to the aspect in which the item is being treated.

If the transcription is for a service comprising several component parts, take the information from the chief source of the core volume(s). Enclose information recorded from any other source in square brackets, and indicate its source in a note.

Give the elements of data in the order of the sequence of the following rules, even if this means transposing data. Transcribe the data as found, however, if case endings are affected, if the grammatical construction of the data would be disturbed, or if one element is inseparably linked to another.

## 1B. Title proper

**1B1.** The title proper is the first element of the description. Indicate in a note the source of the title proper if it is other than the title page. Transcribe the title proper exactly as to wording, order, and spelling, but not necessarily as to punctuation and capitalization. Give accentuation and other diacritical marks that are present in the chief source of information (see also 0H). Capitalize according to AACR 2, 1988 revision, appendix A.

Nimmer on copyright
Occupational Safety and Health Act
Mine safety & health reporter

If the title proper as given in the chief source of information includes symbols that cannot be reproduced by the typographic facilities available, replace them with a cataloger's description in square brackets. Make an explanatory note if necessary.

[Paragraphen]-Sammlung
(Suggested note: On t.p. "Paragraphen" appears as paragraph signs.)

**1B2.** If the title proper includes a statement of responsibility or the name of a publisher, etc., and the statement or name is an integral part of the title proper, transcribe it as such

Medina's Bostwick practice manual
Collier bankruptcy forms manual
Bender's forms of discovery

**1B3.** If the title proper consists solely of the name of a person or body responsible for the item, give such a name as the title proper.

**1B4.** Abridge a long title proper only if this can be done without loss of essential information. Never omit the first five words of the title proper unless the currency of the content is to be omitted according to 1B11.

**1B5.** If a letter or word appears only once but the design of the chief source of information makes it clear that it is intended to be read more than once, repeat the letter or word without the use of square brackets.

**1B6.** If a title proper includes separate letters or initials without periods between them, transcribe such letters without spaces between them. In cases of personal name initials presented in a source without periods, insert a period after each letter.

**1B7.** Supply a title proper for an item lacking the prescribed chief source of information from the rest of the item, or a reference source, or elsewhere. If no title can be found in any source, devise a brief descriptive title. Enclose such a supplied or devised title in square brackets.

**1B8.** If the chief source of information bears titles in two or more languages or scripts, transcribe as the title proper the one in the language or script of the text if this is obvious. If this criterion is not applicable, choose the title proper by reference to the order of titles on, or the layout of the chief source of information. Record the other titles as parallel titles (see 1D).

**1B9.** If the title proper for an item that is supplementary to, a section of, or subordinate to, another publication appears in two or more parts not grammatically linked, record the title of the main work first, followed by the title(s) of the supplementary item(s) or section(s) in order of their dependence. Separate the parts of the title proper by periods.

Art of advocacy. Opening statement
Minnesota legal forms. Personal injury

**1B10. Title on replacement title page differs from earlier title(s)**

If a replacement title page has a title that differs from the original or earlier ones, transcribe the latest title proper in the title and statement or responsibility area. Transcribe in the note area any variations or changes in title known to have occurred previously.

Securities fraud & commodities fraud /
(Note: Title history: Securities law, fraud--SEC rule 10b-5 (1967-Oct.? 1979); Securities fraud and commodities fraud (1979-Dec. 1986))

Canada corporations law reporter
(Note: Title history: Dominion companies law reporter (1949?-1976))

**1B11. Statement of currency of content included in title proper**

When the title proper includes a statement of currency of content, do not transcribe the date as part of the title proper. Indicate the omission by the mark of omission. Make an appropriate note regarding the omission.

Local rules of practice ...
(Note: The title has been transcribed excluding the date of the currency of content)

not: Local rules of practice, as of Mar. 12, 1984
(Note: Title history: Local rules of practice, as of Mar. 12, 1982 (1982); Local rules of practice, as of Mar. 12, 1983 (1983))

**1C. General material designation**

Not used by the Library of Congress for printed materials.

## 1D. Parallel titles

Transcribe parallel titles in the order indicated by their sequence on, or by the layout of, the chief source of information. Record the first parallel title and any subsequent parallel title that is in English. For publications issued in the United States, record all parallel titles appearing on the chief source. Transcribe parallel titles according to the instructions in 1B.

## 1E. Other title information

**1E1.** Transcribe all other title information appearing in the chief source of information according to the instructions in 1B.

**1E2.** Transcribe other title information in the order indicated by the sequence on, or the layout of, the chief source of information.

Record in a note other title information appearing outside the chief source if it is considered to be important.

**1E3.** When other title information is lengthy, either give it in a note (7B5) or abridge it if this can be done without loss of essential information. Never omit the first five words of the other title information. Indicate omissions by the mark of omission.

**1E4.** If the other title information includes a statement of responsibility or the name of a publisher, etc., and the statement or name is an integral part of the other title information, transcribe it as such.

**1E5.** Transcribe other title information following the title proper or parallel title to which it pertains.

If there are no parallel titles and if other title information appears in more than one language or script, give the other title information that is in the language or script of the title proper. If this criterion does not apply, give the other title information that appears first. Optionally, add the other title information in other languages. (LC follows the option.) Precede each parallel statement by an equals sign.

If there are two or more titles that are parallel but other title information for only one of them, transcribe the other title information directly after the corresponding title, no matter the actual order in the source.

**1E6.** If the title proper needs explanation, make a brief addition as other title information, in the language of the title proper.

### 1E7. Other title information on replacement title page varies from earlier other title information

If the replacement title page introduces a change in other title information, record the latest other title information in the title and statement of responsibility area and record the earlier other title information in a note.

Alternately, record all other title information in a note.

If changes are frequent and the other title information can be omitted without loss of essential information, omit it altogether.

Alternately, record the other title information as given on a latest chief source and indicate the variations by a general note, e.g.,

Subtitle on earlier title page(s) varies

**1E8. Statement of currency of content comprises or is included in other title information**

If other title information consists entirely of a statement of currency of content, omit the other title information.

Texas rules of civil procedure

not: Texas rules of civil procedure : including amendments through order of December 5, 1983, effective April 1, 1984

If other title information includes a statement of currency of content, omit the statement of currency of content from the transcription; indicate the omission by the mark of omission.

Eidgenössische Wehrsteuer : Textausgabe mit sämtlichen Erlassen und Ergänzungen ...

not: Eidgenössische Wehrsteuer : Textausgabe mit sämtlichen Erlassen und Ergänzungen : Stand 15. September 1982, einschliesslich Nachtrag 49

## 1F. Statements of responsibility

**1F1.** Transcribe statements of responsibility appearing prominently[3] in the publication in the form in which they appear there. If a statement of responsibility is taken from a source other than the chief source of information, enclose it in square brackets.

/ by Willard H. DaSilva
/ edited by Cyril H. Wecht
/ Alan R. Bromberg and, since 1979, Lewis D. Lowenfels

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[3]"Prominent" sources are those prescribed for the title and statement of responsibility area and the edition area, i.e., the title page, other preliminaries, and colophon. See OD and AACR 2, 1988 revision 0.8.

/ John C. Minahan, Jr. ; adapted from M. Wagner, Minnesota legal forms

**1F2.** Do not include in the title and statement of responsibility area statements of responsibility that do not appear prominently in the item. If such a statement is necessary, give it in a note. If the publication lacks a statement of responsibility, neither construct one nor extract one from the content of the publication.

**1F3.** If a statement of responsibility precedes the title proper in the chief source of information, transpose it to its required position unless it is an integral part of the title proper (see 1B2).

**1F4.** Record a single statement of responsibility as such whether the two or more persons or corporate bodies named in its perform the same function or different functions.

/ Marshall Houts and Walter Rogosheske

**1F5.** If a single statement of responsibility names more than three persons or corporate bodies performing the same function, or with the same degree of responsibility, omit all but the first of each group of such persons or bodies. Indicate the omission by the mark of omission (...) and add et al. (or its equivalent in a nonroman script) in square brackets.

**1F6.** If there is more than one statement of responsibility, give them in the order indicated by their sequence on, or by the layout of, the chief source of information. If the sequence and layout are ambiguous or insufficient to determine the order, give the statements in the order that makes the most sense.

**1F7.** Include titles and abbreviations of titles of nobility, address, honor, and distinction, initials of societies, qualifications, date(s) of founding, mottoes, etc., in statements of responsibility only if:

a) such a title is necessary grammatically;
b) the omission would leave only the person's given name or surname;
c) the title is necessary to identify the person;
d) the title is a title of nobility or is a British term of honor.

Otherwise, omit all such data from statements of responsibility. Do not use the mark of omission.

... / by Harry Smith
(source of information reads: by Dr. Harry Smith)

**1F8.** Add an explanatory word or short phrase to the statement of responsibility if the relationship between the title of the publication and the

person(s) or body (bodies) named in the statement is not clear.

... / [edited] by ...

**1F9**. Replace symbols or other matter that cannot be reproduced by the facilities available with the cataloger's description in square brackets. Make an explanatory note if necessary.

**1F10**. If a publication has parallel titles but a statement(s) of responsibility in only one language or script, transcribe the statement of responsibility after all the parallel titles or other title information.

If a publication has parallel titles and a statement or statements of responsibility in more than one language or script, give each statement after the title proper, parallel title, or other title information to which it relates.

If it is not practicable to give the statements of responsibility after the titles to which they relate, transcribe the statement of responsibility in the language or script of the title proper and omit the others.

**1F11**. If there are no parallel titles and a statement of responsibility appears in more than one language or script, transcribe the statement in the language or script of the title proper. If this criterion does not apply, transcribe the statement that appears first. Optionally, transcribe the parallel statements, each preceded by an equals sign. (LC does not apply the option.)

**1F12**. Treat a noun phrase occurring in conjunction with a statement of responsibility as other title information if it is indicative of the nature of the work.

If the noun or noun phrase is indicative of the role of the person(s) or body (bodies) named in the statement of responsibility rather than of the nature of the work, treat it as part of the statement of responsibility.

In case of doubt, treat the noun or noun phrase as part of the statement of responsibility.

**1F13**. When a name associated with responsibility for the publication is transcribed as part of the title proper (see 1B2) or other title information (see 1E4), do not make any further statement relating to that name unless such a statement is required for clarity, or unless a separate statement of responsibility including or consisting of the name appears in the chief source of information.

> Weinstein's evidence : commentary on rules of evidence for the United States courts and magistrates / by Jack B. Weinstein and Margaret A. Berger

**1F14**. Transcribe a statement of responsibility even if no person or body is named in that statement.

/ translated from the Danish

**1F15**. Omit statements found in the chief source of information that neither constitute other title information nor form part of statements of responsibility.

**1F16. Changes in statement(s) of responsibility**. If the statement(s) of responsibility on a replacement title page or other chief source differs from the original or earlier ones, transcribe the latest statement(s) of responsibility in the title and statement of responsibility area.

/ compiled and edited by Malcolm Evans, Martin Stanford
(Note: Compiled and edited by: Don Hill and Malcolm Evans (1977-July 1980))

/ John Cosgrove McBride, assisted by Thomas J. Touhey
(Note: Authors: John Cosgrove McBride and Isidore H. Wachtel (1972-<1983>))[4]

/ by Arden H. Rathkopf and Daren A. Rathkopf
(Note: Original title pages, v. 1-2 have statement of responsibility: by Arden H. Rathkopf)

If the changes have been numerous, omit the statement and give a note for it in specific or general terms, depending on the situation. Transcribe in the note area any variations within a multipart item (e.g., different authorship of different volumes) or any changes in responsibility known to have occurred previously. If the work is a multipart item, ascertain whether the change in responsibility applies to all volumes or to the volume(s) in hand only.

If the statement of responsibility consists of or includes a corporate body and that body is given in conjunction with a personal name that has changed or is likely to change from time to time, apply one of the following methods:

Omit from the statement of responsibility the personal name. Indicate the omission by the mark of omission.

Official compilation, rules and regulations of the state of Georgia : containing all of the regulations approved for printing by the secretary of state, duly compiled, arranged and numbered as required by law / compiled and printed by ..., secretary of state

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[4]The Library of Congress records temporary data in angle brackets.

Omit the statement of responsibility; instead, record it in a note, omitting the personal name(s).

## 1G. Items without a collective title

1G1. If, in a publication lacking a collective title, one work is the predominant part, treat the title of that work as the title proper and name the other parts in a note (see 7B18).

1G2. If, in a publication lacking a collective title, no one work predominates, describe the publication as a unit (see 1G3).

1G3. If describing the publication as a unit, transcribe the titles of the individually titled works in the order in which they are named in the chief source of information or, if there is no single chief source of information, in the order in which they appear in the publication, treating multiple sources of information as if they were one source.

Separate the titles of the works by semicolons if the works are all by the same person(s) or emanate from the same body (bodies), even if the titles are linked by a connecting word or phrase. Follow the title of each work by its parallel title(s) and other title information. If the individual works are by different persons or emanate from different bodies, or in case of doubt, follow the title of each work by its parallel title(s), other title information, and statement(s) of responsibility. Separate the groups of data with a period followed by one space.

Make the relationship between statements of responsibility and titles clear by additions, as instructed in 1F8.

1G4. If, in a publication lacking a collective title, more than one (but not all) of the separately titled works predominate, treat the predominant works as instructed in 1G3 and name other parts in contents notes (see 7B18).

## 2. EDITION AREA

Contents:
2A. Preliminary rule
2B. Edition statement
2C. Statements of responsibility relating to the edition
2D. Statement relating to a named revision of an edition
2E. Statements of responsibility relating to a named revision of an edition

[**PREAMBLE.** Editions of looseleaf publications generally fall into one of the following categories:

a) In toto replacement editions issued at frequent intervals. These are cataloged as serials if they meet the criteria for serials (see Introduction).

b) In toto replacement editions issued at infrequent intervals. A separate bibliographic record is prepared for each edition. The edition statement is recorded according to the rules stated below.

c) Gradual replacement editions, i.e., at some point of updating the author or publisher considers the work to constitute a new edition, although no in toto physical replacement is taking place; instead a replacement title page carrying a new edition statement is received with a shipment of updates. A single bibliographic record is prepared for these. The source for recording the edition statement for these is the latest replacement title page or its substitute.]

### 2A. Preliminary and general rules

#### 2A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Precede the edition area by a period-space-dash-space.

Precede a statement relating to a named revision of an edition by a comma.

Precede the first statement of responsibility following an edition statement by a diagonal slash.

Precede each subsequent statement of responsibility by a semicolon.

For the use of the equals sign to precede parallel statements, see the appropriate rules following.

**2A2. Sources of information.** The prescribed sources of information for the edition area are the latest title page, latest other preliminaries, and latest colophon, in that order of preference. If an edition statement is not present in any of these sources, it may be taken from any source within the publication. If the edition statement, or any part of it, is taken from elsewhere than the prescribed sources, enclose the information in square brackets.

## 2B. Edition statement

**2B1.** Transcribe the edition statement as found on the publication. Use standard abbreviations (see AACR 2, 1988 revision, appendix B) and numerals in place of words (see AACR 2, 1988 revision, appendix C).

4th ed.
(Source of information reads: Fourth edition)

However, if the edition statement includes a statement of currency of content, omit this information and replace it by the mark of omission. In addition, make a note regarding the omission.

1981 ed. with ... supplement
(Source of information reads: 1981 edition with 1987 supplement)
(Suggested note: The edition statement has been transcribed excluding the date of the currency of content)

**2B2.** If the edition statement consists solely or chiefly of characters that are neither numeric nor alphabetic, give the statement in words in the language or script of the title proper and enclose them in square brackets.

[Three asterisks] ed.

**2B3.** In case of doubt about whether a statement is an edition statement, take the presence of such words as "edition" or "revision" (or their equivalents in other languages) as evidence that such a statement is an edition statement, and transcribe it as such.

Murphy's will clauses : annotations and forms with tax effects. -- New York ed.

### 2B4. Gradual replacement edition/Replacement title page issued with a new edition statement

If the publication is one for which the changeover to a new edition is a gradual one (see 2. Preamble), update the edition statement, using as the source the statement given on the latest replacement title page or its substitute. Add an appropriate explanatory note.

3rd ed.
(Note: Updated to third edition, May 1986)

Alternately, if the changes are frequent, omit the edition statement and give the information in a note instead (see 7B7).

## 2C. Statements of responsibility relating to the edition

**2C1.** Transcribe a statement of responsibility relating to one or more editions, but not to all editions, of a given work following the edition statement if there is one. Such statements may include names of either persons or corporate bodies, and may relate to any contributor to the intellectual or artistic contents of the edition (e.g., the reviser of a new edition). Follow the instructions in 1F for the transcription and punctuation of such statements of responsibility.

**2C2.** In case of doubt about whether a statement of responsibility applies to all editions or only to some, or if there is no edition statement, give such a statement in the title and statement of responsibility area.

**2C3.** If a publication has parallel edition statements that have been recorded and a statement of responsibility relating to the edition in only one language or script, give the statement of responsibility after all the parallel edition statements.

**2C4.** *Optional addition.* If a publication has both an edition statement and a statement of responsibility relating to the edition in more than one language or script, give each statement of responsibility after the edition statement to which it relates. (LC does not apply the optional addition.)

**2C5.** If a publication has an edition statement in only one language or script and a statement of responsibility relating to the edition in more than one language or script, give the statement of responsibility in the language or script of the title proper. If this criterion does not apply, give the statement that appears first.

*Optionally,* transcribe the parallel statements of responsibility after the edition statement, each preceded by an equals sign. (LC does not apply the option.)

## 2D. Statement relating to a named revision of an edition

**2D1.** If an item is a revision of an edition (a named reissue of a particular edition containing changes from that edition), transcribe the statement relating to that revision following the edition statement and its statements of responsibility.

... / by ... . -- 2nd ed. / revised by

## 2E. Statements of responsibility relating to a named revision of an edition

**2E1**. Transcribe a statement of responsibility relating to one or more named revisions of an edition (but not to all such revisions) following the statement relating to the revision(s). Follow the instructions in 1F for the transcription and punctuation of such statements of responsibility.

**2E2**. If a publication has parallel statements relating to the revision of an edition that have been recorded and a statement of responsibility relating to that revision in only one language or script, give the statement of responsibility following all the parallel statements relating to the revision.

**2E3**. *Optional addition.* If the statement of responsibility referred to in 2E1 appears in more than one language or script, give each statement as instructed in 2C4 and 2C5. (LC does not apply the option.)

## 3. MATERIAL (OR TYPE OF PUBLICATION) SPECIFIC DETAILS AREA

This area is not used for printed material.

## 4. PUBLICATION, DISTRIBUTION, ETC., AREA

Contents:
4A. Preliminary rule
4B. General rule
4C. Place of publication, distribution, etc.
4D. Name of publisher, distributor, etc.
4E. Statement of function of publisher, distributor, etc.
4F. Date of publication, distribution, etc.
4G. Place of printing, name of printer, date of printing

### 4A. Preliminary rule

#### 4A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Precede the publication, etc., area by a period-space-dash-space.

Precede a second or subsequently named place of publication, etc., by a semicolon.

Precede the name of the publisher or distributor by a colon.

Enclose a supplied statement of function of a publisher, distributor, etc., in square brackets.

Precede the date of publication, distribution, etc., by a comma.

Enclose the details of manufacture (place, name, date) in parentheses.

Precede the name of a manufacturer by a colon.

Precede the date of manufacture by a comma.

For the use of the equals sign to precede parallel statements see the appropriate rules following.

#### 4A2. Sources of information

The prescribed sources of information for the **place of publication** and the **publisher** are the latest title page, cover (binder), preliminaries, and colophon, in that order of preference.

The prescribed source of information for the **date** of publication is the earliest title page, cover (binder), preliminaries, and colophon, in that order of preference, i.e., record here the date the publication began. If the publication has ceased, record inclusive dates.

Enclose information supplied from any other source in square brackets.

### 4B. General rules

In this area record information about the place, name, and date of all types of publishing, distributing, and issuing activities.

Information relating to the manufacture (printing) of the publication is also recorded in this area.

When more than one place, name, or date is recorded in this area, give them in the order that is appropriate to the publication being described.

Give the names of places, persons, or bodies as they appear, omitting accompanying prepositions unless case endings would be affected. Use abbreviations as instructed in AACR 2, 1988 revision, appendix B.

If the original publication details are covered by a label containing publication details, give the publication details given on the label. Give the publication details covered by the label in a note if they can be easily ascertained.

**4C. Place of publication, distribution, etc.**

Transcribe the place of publication, distribution, etc., in the form and the grammatical case in which it appears.

If the place of publication, distribution, etc., on a replacement title page differs from the original or earlier ones, transcribe the latest place of publication, distribution, etc.

If the name of the place appears in more than one language or script, record the form in the language or script of the title proper. If this criterion does not apply, record the form that appears first.

If a place of publication and the name of its larger jurisdiction(s) (e.g., county, state, or similar designation) appear together in the source from which they are being transcribed (e.g., title page, cover (binder), etc.), transcribe all that appear. Do this even if the place does not need to be identified or is clearly the best known one of that name.

source: New York, New York
transcription: New York, N.Y.

source: Washington, D.C.
transcription: Washington, D.C.

source: Taipei, Taiwan, China
transcription: Taipei, Taiwan, China

If a place of publication and the name of its larger jurisdiction do not appear together, supply the name of the country, state, province, etc., if it is considered necessary for identification or distribution, using the English form of name if there is one. Use abbreviations (see AACR 2, 1988 revision, appendix B.14).

Cambridge [Mass.]

If a place name is found only in an abbreviated form in the publication, transcribe it as found, and add the full form or complete the name.

Mpls [i.e. Minneapolis]
Rio [de Janeiro]

If two or more places in which a publisher, distributor, etc., has offices are named in the publication, give the first named place. Give any subsequently named place that is given prominence by the layout or typography of the source of information. If the first named place and any place given prominence are not in the home country of the cataloging agency, give also the first of any subsequently named places that is in the home country. Omit all other places.

Toronto
(Source of information reads: Toronto, Buffalo, London. Cataloging agency in Canada)

London ; New York
(Cataloging agency in the United States)

Montréal ; Toronto
(Toronto given prominence by typography)

New York ; London ; Sydney
(London given prominence by typography. Cataloging agency in Australia)

For items with two or more places of publication, distribution, etc., relating to two or more publishers, distributors, etc., see 4D.

If the place of publication, distribution, etc., is uncertain, supply the probable place in the language of the chief source of information, followed by a question mark.

If no place or probable place can be given, give the abbreviation s.l. (sine loco), or its equivalent in a nonroman script.

Optionally, give the full address of a publisher, distributor, etc., after the name of the place. Enclose the full address in parentheses. Do not give the full address for major trade publishers. (LC follows the option if the publication meets these three conditions, regardless whether the publisher is a major or minor one (see LCRI 1.4C7)):

a) it was issued by a U.S. publisher, distributor, etc., whose address is given in the publication being cataloged;

b) it is still being issued or was issued in the current three years;

c) it does not bear an ISBN or ISSN.

Do not transcribe this information if two or more publishers, distributors, etc., are being recorded in the publication, etc., area.

When applying this rule, routinely repeat the name of the city in the address. For street addresses, abbreviate such words as "street," "avenue," etc., according to normal usage. Omit unnecessary elements from the address. Do not bracket any of the elements given in the address.

New York, N.Y. (235 E. 45th St., New York 10017) :
Bender
(source of information reads: Matthew Bender, 235 E. 45th Street, New York, N.Y. 10017)

but Delran, NJ, USA : Datapro Research Corp.
(source of information reads: Datapro Research Corporation, Delran, NJ 08075 USA)

**4D. Name of publisher, distributor, etc.**

**4D1.** Transcribe the name of the publisher, etc., following the place(s) to which it relates.

London : H.M.S.O.
Englewood Cliffs, N.J. : Prentice-Hall

If the name of the publisher, etc., on a replacement title page differs from the original or earlier ones, transcribe the latest publisher, etc. Make notes on details of earlier publisher(s), etc., if considered important for identification (see 7B9).

**4D2.** Give the name of a publisher, etc., in the shortest form in which it can be understood and identified internationally.

: Bender
not : Matthew Bender

If the shortest form of the name of the publisher, etc., is in more than one language or script, give the form that is in the language or script of the title proper. If this criterion does not apply, give the shortest form in the language or script that appears first.

Omissions. When the name of a publisher, etc., is part of a hierarchy, for commercial publishers only omit parts of the hierarchy that are not needed to identify the publishing entity.

**4D3.** In giving the name of a publisher, etc., retain:

a) words or phrases indicating the function (other than solely publishing) performed by the person or body
: Published for the Center for Oceans Law and Policy, University of Virginia School of Law [by] Oceana Publications

b) parts of the name required to differentiate between publishers, etc., or to identify subsidiary companies

: Longmans, Green

but : Longmans Educational not : Longmans

**4D4.** If the name of the publisher, etc., appears in a recognizable form in the title and statement of responsibility area, give it in the publication, etc., area in the shortest possible form. If, in such a case, the publisher, etc., is a person, give the initials and the surname of the person. Do not give the name of a publisher, etc., in a shortened form if doing so creates doubt about the intelligibility of the result.

**4D5.** If a publication has two or more publishers, distributors, etc., describe it in terms of the first named and the corresponding place(s). In the following cases add subsequently named publishers, distributors, etc., and their corresponding places (if they are different from the place(s) already named):

a) when the first and subsequently named entities are linked in a single statement

b) when the first named entity is a distributor, etc., and a publisher is named subsequently

c) when a subsequently named entity is clearly distinguished as the principal publisher, distributor, etc., by layout or typography

Toronto : McClelland and Stewart : World Crafts Council
(Second publisher given prominence by typography)

d) when the subsequently named publisher, distributor, etc., is in the country of the cataloging agency and the first named publisher, distributor, etc., is not.

Paris : Gauthier-Villars ; Chicago : University of Chicago Press
(Cataloging agency in the United States)

New York : Dutton ; Toronto : Clarke, Irwin
(Cataloging agency in Canada)

**Recording Multiple Entities**

When recording the names of two or more publishers, distributors, etc., and the names appear together in the item in a single statement that connects them linguistically, generally give them in a single statement rather than separating them with a space-colon-space. However, if the names need to be transcribed after different places, give each entity in a separate publisher statement in the publication, etc., area.

New York : Foremost American Pub. Corp. for Bowker

London : National Council for Educational Technology with the Library Association

London : Bodley Head for Mackays

but New York : Garland ; Paris : Fondation Le Corbusier
(source: Garland Publishing, Inc., New York and London, and Fondation Le Corbusier, Paris)

Note that if the entities are located in different places, it does not necessarily mean that the item was published, distributed, etc., in those places. Record as places of publication, etc., only the locations of the entities that are actually publishing, distributing, etc., the item. However, name of places rejected for recording as places of publication, etc., may be retained in the publisher statement if they appear in conjunction with the names of the entities being recorded there.

If the names of two or more entities appear in separate statements on the publication, do not routinely give in this area the entities that are not involved with the publication, distribution, etc., of the publication. Generally give them in a quoted note instead.

foot of t.p.: George Godwin, London and New York
middle of t.p.: Published in association with the Plastics and Rubber Institute
publication, etc., area: London ; New York : Godwin
note area: "Published in association with the Plastics and Rubber Institute"

t.p.: Chapman & Hall Limited London
t.p. verso: Springer Verlag Berlin Heidelberg New York
publication, etc., area: London : Chapman & Hall ; Berlin ; New York : Springer

**4D6.** Optionally, give the name and, when appropriate, the place of the distributor when the first named entity is a publisher. (LC follows the option.)

St. Louis : Veterans Administration Medical Center ;
Washington, D.C. : Distributed by National Audiovisual Center

**LC Option Decision**

Apply the optional provision of the rule. If information concerning the distributor is printed or appears on a stamp or label anywhere in the item, record the distributor in the publication, etc., area.

**4D7.** If the name of the publisher, etc., is unknown, give the abbreviation s.n. (sine nomine) or its equivalent in a nonroman script.

Paris : [s.n.]

**4E. *Optional addition.* Statement of function of publisher, distributor, etc.**

**4E1.** Add to the name of a publisher, distributor, etc., one of the terms below:

distributor
publisher

unless:

a) the phrase naming the publisher, distributor, etc., includes words that indicate the function performed by the person(s) or body (bodies) named

or b) the function of the publishing, distributing, etc., agency is clear from the context.

Apply the rule when there are two entities named, one for publishing and the other for distributing, but the distributing entity's name does not convey an indication of this function. Apply it also when a single entity is named, it is known that this entity performed only a distributing function, and its name does not indicate this function. Do not apply it in other cases.

If the phrase indicating the function of distribution is simple, e.g., "for sale by," record it as it appears. For complex statements from which a succinct phrase cannot conveniently be taken, substitute the word "distributor", in square brackets, as a qualification to the body's name.

**4F. Date of publication, distribution, etc.**

[PREAMBLE. The application of AACR 2 rule 1.4F2 ("Give the date as found in the item even if it is known to be incorrect. If a date is known to be incorrect, add the correct date") and its predecessors (rule 141 to AACR 1 and rule 139 of Revised chapter 6, AACR 1) to looseleaf materials has in the past resulted in frequent inadvertent

duplication of bibliographic records for the same publication. For unlike other institutions, the Library of Congress receives under the copyright law, in addition to the regular updating service received within the year, complete updated copies updated within a year. Such an in toto updated copy has a new (replacement) title page that carries a new publication or copyright date, or both. Literal application of rule 1.4F to looseleaf materials results in handling such updated copies as editions of the work. The examples below illustrate three bibliographic records prepared inadvertently for copies of a single work received at different stages of update:

, 1965- (date first published)

, 1970- [i.e., 1967]- (updated copy with new title page cataloged as an edition; cataloger has noticed that a discrepancy exists between the date of publication given on the latest title page and the earliest date given on a dated page)

, 1972- (updated copy with new title page; cataloger has not been aware of the existing discrepancies between the date of publication given on the latest title page and the earliest date given on individual pages)

A bibliographic control system that entails using a single record is viable only if all institutions use as the date of publication the initial date, i.e., **first** date of publication or copyright (or, as temporary date, the earliest date known), not the date of a revised title page that differs at a given time on copies in different institutions and even on copies within the same institution.]

Give as the date of publication the year when the edition, revision, etc., named in the edition area was first published.[5] If there is no edition statement, give the date of the first publication of the edition to which the item belongs. Give dates in Western-style arabic numerals. If the date of publication is not known, give the earliest copyright date in its place, if it is known.

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[5]Many publishers list in their catalogs the beginning date of a looseleaf service. An additional excellent source is A. Arlene L. Eis's annual Legal Looseleafs in Print.

If neither of these dates is known, record as a temporary date the earliest known date of publication or copyright date (usually gleaned from the publication itself).[6]

If the original date or earliest known date differs from the date of publication or copyright date given in the (latest) chief source, disregard the date(s) given in the (latest) chief source, i.e., record, in square brackets, the date or copyright date the item was first published; or, as temporary data, the earliest date known. Give an appropriate note if the source of date is other than the publication itself.

In describing a publication that is still being published, give the earliest date only, and follow it with a hyphen and four spaces.[7] Do not add the ending punctuation (see LCRI 1.0C)

, 1983- c1982-
(beginning date in chief source and ascertained from the publication; copyright date differs)

, c1984-
(title page gives copyright date only; it is not known whether the title page is the original or a later replacement; beginning date verified from Legal Looseleafs in Print, 1985)

, [1983?]-
(probable date the publication began)

, [1985]-
(Note: Date from: publisher's catalog, 1986)

, <1985>-
(date in chief source; beginning date not ascertained)

When the publication has ceased, record inclusive dates.

, 1960-1980
, 1950-1970, c1949-c1970
, 1950-c1969, c1949-c1969

When the publication has ceased and the final date of the chief source of information differs from that of the date (year) of the latest updates within the publication, correct it to the date (year) of the latest updates within the publication, if this information is easily found.

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[6]The Library of Congress records temporary data in angle brackets.

[7]Unlike multipart items in book form, a provision for recording the latest temporary imprint date at a given time serves no real purpose when cataloging looseleaf material.

, 1960-c1981, i.e., 1982
(final t.p. is dated c1981 but material includes updates the latest of which are dated Sept. 1982)

, <c1970>-c1981 [i.e. c1982]
(beginning date unknown; final t.p. is dated c1981 but material includes updates dated "c1982")

## 5. PHYSICAL DESCRIPTION AREA

Contents:
5A. Preliminary rule
5B. Extent of publication
5C. Illustrative matter
5D. Dimensions
5E. Accompanying material

### 5A. Preliminary rule

#### 5A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Begin this area with a new paragraph.

Separate the extent of looseleaf volumes from the extent of bound, cumulative, transfer, etc., volumes by a comma.

Precede other physical details (i.e., other than extent or dimensions) by a colon.

Precede the dimensions by a semicolon.

Precede a statement of accompanying material by a plus sign.

Enclose physical details of accompanying material in parentheses.

**5A2. Sources of information.** Take information for this area from any source. Take explicitly or implicitly stated information from the item itself.

### 5B. Extent of publication

**5B1.** Describe all looseleaf publications, active or dormant, as 1 v. (loose-leaf), 2 v. (loose-leaf), etc., as appropriate. If all volumes (binders) are unnumbered, consider each volume (binder) to constitute a separate bibliographic volume.

In describing multivolume publications consisting of both numbered and unnumbered volumes (e.g., the set consists of four numbered volumes and an unnumbered index/tables volume), record in the extent statement the numbered volumes only. Record the unnumbered volume(s) in a note; indicate explicitly the total number of unnumbered volumes if this is not clear from the note itself (see 7B17).

4 v. (loose-leaf)
(Note: Includes unnumbered Index/tables volume)

Optionally, if a looseleaf publication comprises multiple components (subservices), do not describe the extent of an active looseleaf publication. (LC follows the option.)

v. (loose-leaf)[8]

Describe a looseleaf service comprising components that are looseleaf and those that are not looseleaf in terms appropriate to each. Qualify the extent of the component that is not looseleaf by the phrase "(not loose-leaf)." (See 5B3.)

**5B2. Transfer volumes**[9]

Describe the extent of volumes of a looseleaf publication that includes transfer material of a single type (e.g., cases decided) in terms of "loose-leaf" and "transfer."

2 v. (loose-leaf), 6 v. (transfer)

Describe the extent of volumes of a looseleaf publication that includes transfer material of two or more different types in terms of loose-leaf and the total of transfer volumes.

2 v. (loose-leaf), 17 v. (transfer)

Optionally, do not record the extent of transfer material during the lifetime of the publication. (LC follows the option.)

1 v. (loose-leaf), v. (transfer)

**5B3. Services published in sections/subservices** (some looseleaf and some not)

Describe the extent of a service consisting of one or more looseleaf sections or subservices and one or more non-looseleaf sections or subservices in terms of the total of the looseleaf and the total of the non-looseleaf volumes. If some of the non-looseleaf sections constitute transfer materials, describe all as "not loose-leaf."

1 v. (loose-leaf), 10 v. (not loose-leaf)
2 v. (loose-leaf), 27 v. in 30 (not loose-leaf)
21 v. (loose-leaf), 28 v. (not loose-leaf)

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[8]Throughout the duration of such a publication, the Library of Congress lists the holdings in the shelflist only.

[9]For a definition see the glossary.

Optionally, do not record the extent of either looseleaf or non-looseleaf material, or both, during the lifetime of the publication.[10]

21 v. (loose-leaf), v. (not loose-leaf)
v. (loose-leaf), v. (not loose-leaf)

**5B4. Expanded/split volumes.**[11] When a numbered volume of a multivolume publication is later expanded and split into several volumes (e.g., volume 2 of a 3-volume set has been replaced by volumes 2A and 2B), record the expansion as one bibliographic volume in several physical volumes (binders). Update the extent as necessary.

3 v. in 4

However, when an unnumbered volume in a numbered series later expands into several volumes that carry no numbering per se and only the numbering of the series is expanded, record each unnumbered volume (binder) as a separate bibliographic volume.

3 v. (loose-leaf) ; 26 cm. (Real estate transactions; v. 2, 2A, 2B)

## 5C. Illustrative matter

Give ill. for an illustrated publication unless the illustrations are all of one or more of the particular types mentioned in the next paragraph.[12] Tables, etc., containing only words and/or numbers are not illustrations. Disregard illustrated title pages and minor illustrations.

1 v. (loose-leaf) : ill.

If the illustrations are of one or more of the following types, and are considered to be important, give the appropriate term or abbreviation (in this order): facsimiles, forms, genealogical tables, maps, music, plans, portraits, samples. If only some of the illustrations belong to these types, give the abbreviation ill. first. Designate all other types as ill.

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[10]Throughout the duration of such a publication, the Library of Congress lists the holdings of the non-looseleaf sections in the shelflist only. The decision was made on the premise that for the user such a compound listing is of marginal use and does not justify the extra steps needed in processing such material.

[11]For a definition see the glossary.

[12]With the exception of publications consisting predominantly of illustrations (see last paragraph of 5C below), the Library of Congress describes all illustrated printed material as "ill." in all cases.

3 v. (loose-leaf) : forms

Describe colored illustrations (i.e., those in two or more colors) as such.

: ill. (some col.)

Do not specify the number of illustrations.

If the publication consists predominantly of illustrations, use the term chiefly ill. If those illustrations are all of one type, use chiefly followed by the name of the type.

: chiefly forms

**5D. Dimensions**

When the binder is one supplied by the publisher, measure the height of the binder. When a looseleaf is received and cataloged without a publisher's binder, measure the height of the publication itself, not the binder supplied by a particular cataloging agency.

Give the height of a publication (based on the copy in hand) in centimeters, counting a fraction of a centimeter as a full centimeter (e.g., when a publication measures 24.1 centimeters, record it as 25 cm.).

If the width of a volume is greater than the height or less than half the height, give the height and the width separated by a multiplication sign.

20 x 31 cm.

If the volumes of a multivolume publication, including those with transfer or expanded volumes, or services, including subservice sets, differ in height, give the smallest or smaller and the largest or larger size, separated by a hyphen.

26-29 cm.

**5E. Accompanying material**

**5E1**. Give details of accompanying material (see Glossary) in one of the following ways:

a) make a separate entry
or b) make note (see 7B11)
or c) give the number of physical units in arabic numerals and the name of the accompanying material (using, when appropriate, a specific material designation) at the end of the physical description.

1 v. (loose-leaf) ; 26 cm. + 1 computer disk

## 5E2. Accompanying software material[13]

Record the extent of a computer file issued on a physical carrier by giving the number and kind of physical carrier. Use arabic numerals and one of the following terms:

computer cartridge
computer cassette
computer disk
computer reel

If none of these terms is appropriate for designating the physical carrier, give the specific name as concisely as possible, preferably qualified by the word "computer."

Indicate the type of physical medium of the carrier if this information is readily available and desired.

1 computer chip cartridge
2 computer tape cassettes
1 laser optical disk
3 computer tape reels

If the file is encoded for sound or color, give the abbreviations sd. and col. If the carrier is a disk, show the size of the disk by the diameter in inches to the next ¼ inch. If the carrier is a cartridge, measure the length of the side of the cartridge that is to be inserted into the computer. Give the length of this side in inches to the next 1/8 inch up. If the carrier is a cassette, give the length and height of the face of the cassette in inches to the next 1/8 inch up (this applies to both standard and nonstandard size cassettes). If the carrier is a reel, do not give the size. For physical carriers that are newly developed, give the size in centimeters to the next whole centimeter up.

2 v. (loose-leaf) ; 26 cm. + 10 computer disks (col. ; 3½ in.)

Give pertinent information about the equipment on which the file runs in a note (see 7B11), unless the information is already given in the physical description.

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[13]Based on AACR 2, 1988 revision, Chapter 9.

## 6. SERIES AREA

Contents:
6A. Preliminary rule
6B. Title proper of series
6C. Parallel titles of series
6D. Other title information of series
6E. Statements of responsibility relating to series
6F. ISSN of series
6G. Numbering within series
6H. Subseries
6J. More than one series statement

### 6A. Preliminary rule

#### 6A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Precede this area by a period-space-dash-space.
Enclose each series statement (see 6J) in parentheses.
Precede each parallel title by an equals sign.
Precede other title information by a colon.
Precede the first statement of responsibility by a diagonal slash.
Precede each subsequent statement of responsibility by a semicolon.
Precede the ISSN of a series or subseries by a comma.
Precede the numbering within a series or subseries by a semicolon.
Precede the title of a subseries by a period.

For the use of the equals sign to precede parallel statements, see the appropriate rules following.

**6A2. Sources of information.** The chief source of information for a series is the series title page. If the publication lacks a series title page, the chief source for the series is the chief source for the analytic. If the series title does not appear on the chief source for the analytic, the chief source for the series is (in this order of preference) the cover, caption, masthead, editorial pages, colophon, other pages. These provisions apply to numbered and unnumbered series; for series-subseries, however, apply LCRI 1.6H. Enclose any information supplied from other sources in square brackets, within the parentheses enclosing each series statement. For additional details not covered here, see the pertinent Library of Congress rule interpretations regarding series.

### 6B. Title proper of series

**6B1.** Transcribe each series title exactly as to wording, order, and spelling, but not necessarily as to punctuation and capitalization. Give accentuation and other diacritical marks that are present in the chief source of information (see also 1B and AACR 2, 1988 revision, rules 12.1B2-12.1B7).

6B2. If different forms of the title of the series (other than parallel titles) appear, choose the title given in the first of the prescribed sources for the series area as the title proper of the series. Give the other form(s) in the note area if of value in identifying the item.

If the title of the series does not appear in the first of the prescribed sources of information and different forms appear elsewhere in the publication, choose the title given in the other prescribed sources in the order of preference for the sources (e.g., if different forms appear in the second and third sources, choose the one appearing in the second source).

### 6C1. Parallel title of series

Record parallel titles in the order indicated by their sequence on, or by the layout of, the chief source of information.

If the series title appears in two or more languages, choose as the title proper for the series statement the title that matches the language (or clearly predominant language) of the particular publication being cataloged. If this criterion cannot be applied, choose the first title. Record the other titles according to the provisions of 1D.

### 6D. Other title information of series

Include other title information of a series only if it provides valuable information identifying the series. Follow instructions in 1E when recording other title information of a series.

### 6E. Statements of responsibility relating to series

Give statements of responsibility appearing in conjunction with the series title only if they are considered to be necessary for identification of the series. Follow the instruction in 1F when recording a statement of responsibility relating to a series.

### 6F. ISSN of series

Give the International Standard Serial Number (ISSN) of a series if it appears in the item being described (see also 6H). Give the ISSN in the standard manner, i.e., *ISSN* followed by a space and two groups of four digits separated by a hyphen.

### 6G. Numbering within series

6G1. Give the numbering of the publication within the series in the terms given in the publication. Use abbreviations (see AACR 2, 1988 revision, appendix B) and substitute arabic numerals for other numerals or spelled out numbers (see AACR 2, 1988 revision, appendix C).

**6G2. Multivolume publications**

[PREAMBLE. Expanded/split volumes. Looseleafs that start as single-volume publications but are later expanded/split into several volumes may or may not be numbered as the result of expansion. If the publication is in a series (usually a larger multipart publication), the series numbering applied to the expanded volumes is usually dependent upon the publishing pattern of the larger work and the facility with which the series numbering of the expanded volumes can be fit within the already existing publishing pattern. In some cases the expanded volumes may be numbered in their own right, e.g., "volume 1," "volume 2," etc., with series numbering expanded as, e.g., "volume 9A," "volume 9B," etc. Equally as often the item, although expanded into several volumes (binders), carries no volume numbering per se and only the numbering of the series is expanded, e.g., "volume 2," "volume 2A," "volume 2B," etc.

For looseleaf publications in a series (usually a larger multipart publication), the Library of Congress lists the series numbers applied to each part (including expanded volumes) explicitly (not in compressed form) in the series statement for as long as the looseleaf is being published, e.g., ; v. 15A, 15B, 15C not ; v. 15A-C. This is because of the special numbering characteristics of some looseleaf publications. From the point of view of bibliographic description, the series numbering could easily be recorded in conventional form. However, taking into consideration the bibliographic control of the expanding volumes, their recording in the extent portion of the physical description area, as well as the recording of the holdings in the shelflist (where the unnumbered items, presently assigned numbering, are best controlled by identifying each volume also by the series number), it is best not to use a compressed notation in the series statement.]

If the parts of a multivolume item are separately numbered within a series, give the first and the last numbers if the numbering is continuous; otherwise, give all numbers.[14]

Patent law and practice ; v. 2B-J
Patent law and practice ; v. 4-5

Optionally, for expanded active looseleaf publications, record volume numbers in detail. (LC applies the option.)

work in progress (Patent law and practice ; v. 4, 4 pt. 2, 4A, 4B, 4C, 5)
work ceased (Patent law and practice ; v. 4-5)

work in progress (Real estate transactions ; v. 2, 2A, 2B)
work ceased (Real estate transactions ; v. 2)

work in progress (Patent law and practice ; v. 2, 2A)
work ceased (Patent law and practice ; v. 2-2A)

work in progress (Patent law and practice ; v. 2B, 2C, 2D, 2E, 2F, 2G, 2H, 2I, 2J)
work ceased (Patent law and practice ; v. 2B-J)

**6G3.** If the publication has a designation other than a number, give the designation as found. **Exception:** Substitute arabic numerals for asterisks (without the use of square brackets).

; 1986
; vol. E

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[14]For multivolume publications (other than expanded/split volumes) record volumes comprising several separately issued and numbered parts in terms of volumes only. For example: record a four-part multivolume publication constituting volume 2 of a series as "v. 2," not as "v. 2, pt. 1-4."

Follow this practice also when the holdings of a multivolume publication are incomplete. This means that an account of the volumes comprising the multivolume publication is kept in the physical extent area, not in the series statement. For example: if the library has parts 1 and 3 of volume 1 of a multivolume publication that constitutes volume 5 of a series, record in the

physical extent area: v. <1, pt. 1,3>
series statement: ; v. 5

Note that the series numbering is recorded as complete even though the volume itself, shown in the physical extent area, is not yet complete.

## 6H. Subseries

6H1. If a publication is one of a subseries[15] and both the series and the subseries are named in the item, give the details of the main series (see 6A-6G) first and follow them with the name of the subseries and the details of that subseries.[16]

6H2. If the subseries has an alphabetic or numeric designation and no title, give the designation. If such a subseries has a title as well as a designation, give the title after the designation.

[Title of series]. Series 2 ; no. 1
[Title of series]. Reihe 5, Rechtsprechung

6H3. Give parallel titles, other title information, and statements of responsibility relating to subseries as instructed in 6C, 6D, and 6E.

6H4. Give the ISSN of a subseries if it appears in the publication being described; in such a case, omit the ISSN of the main series.

Title of main series. Title of subseries, ISSN 1234-5678

not Title of main series, ISSN 2345-6789. Title of subseries, ISSN 1234-5678

6H5. Give the numbering within a subseries as instructed in 6G.

## 6J. More than one series statement

6J1. The information relating to one series, or series and subseries, constitutes one series statement. If a publication belongs to two or more series and/or two or more series and subseries, give separate series statements and enclose each statement in parentheses. Follow the instructions in 6A-6H in recording each series statement. If the criterion applies, give the more specific series first.

If some parts of a multipart publication are published in one series and other parts are published in another series, precede each series title with an indication of the particular parts or issues to which the series

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[15]Defined as "A series within a series, i.e., a series that always appears in conjunction with another, usually more comprehensive, series of which it forms a section. Its title may or may not be dependent on the title of the main series."

[16]If one title is a multipart publication and the other is a serial, treat each as separate series; if both titles are multipart publication, apply LCRI 25.6A to determine if the two titles are to be treated as one entity or established separately. (See also LCRI 1.6H.)

titles apply. (If a monographic series has changed its title (see AACR 2, 1988 revision, rule 21.2), treat each title as a separate series; for multipart monographs, see rule 21.3A.)

If all the parts or issues appear in one series and some of the parts or issues appear also in another series, precede the second series title with an indication of the particular parts or issues applicable to that title.

In the two situations listed above, if any series is classified as a collection, include its call number in the appropriate series statement (unless the same call number applies to all the series given).

If some of the parts of a multipart item appear in a series but other parts or issues do not, precede the series title with an indication of the particular parts that are applicable to the series. If the series is classified as a collection, include its call number in the series statement.

If parts of an item belong to different series and this relationship cannot be stated clearly in the series area, give details of the series in a note.

## 7. NOTE AREA

Contents:
- 70. General instructions
- 7A. Preliminary rule
- 7B. Notes

### 70. General instructions

Notes qualify and amplify the formal description where the rules for such description do not allow certain information to be included in the other areas. They can, therefore, deal with any aspect of the publication.

Notes, by their nature, cannot be enumerated exhaustively, but can be categorized in terms of the areas of description. In addition to notes relating to these areas there are notes relating to the description of the publication which do not correspond to any of the formalized areas of description.

Whenever a change in title, statement of responsibility, publisher, etc., has taken place, a note reflecting the earlier information must be given in order to identify the publication up to now listed elsewhere in catalogs or bibliographies under a different form.

### 7A. Preliminary rule

**7A1. Punctuation.** Start a new paragraph for each note; end each paragraph with a period or other mark of final punctuation; if the mark of final punctuation is a closing bracket or parenthesis, however, add a period.[17]

Separate introductory wording from the main content of a note by a colon followed but not preceded by a space.

**7A2. Sources of information.** Take data recorded in notes from any suitable source. Square brackets are required only for interpolations within quoted material.

### 7A3. Form of notes

Order of information. If data in a note correspond to data found in the title and statement of responsibility, edition, publication, physical description, or series areas, usually give the elements of the data in the order in which they appear in those areas. In such a case, use prescribed punctuation, except substitute a period for a period-space-dash-space.

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[17] LC follows the practice stated here. Note that the examples here and in the LCRI texts as a matter of style do not show ending periods for notes.

Quotations. Give quotations from the publication or from other sources in quotation marks. Follow the quotation by an indication of its source, even if that source is the title page, original or replacement. Do not use prescribed punctuation in quotations.

Formal notes. Use formal notes employing an invariable introductory word or phrase or a standard form of words when uniformity of presentation assists in the recognition of the type of information being presented or when their use gives economy of space without loss of clarity.

Informal notes. When making informal notes, use statements that present the information as briefly as clarity, understandability, and grammar permit.

### 7A4. Notes citing other editions and works

Other editions. In citing another edition of the same work, give enough information to identify the edition cited.

Revision of: Rev. ed., 1973-1981

If the work being cited is entered under a name heading that differs from the main entry heading on the work being cataloged and the difference is not apparent from information given in the body of the entry, add the name after the title (uniform title or title proper) and a space-slash-space.

When a revised edition (other than a revised translation of a work) is being cataloged and

a) it has a different title from that of the previous edition, or
b) it has a different choice of entry from that of the previous edition (for reasons other than the change to AACR 2),

link the new edition with the immediately preceding edition by using AACR 2 style for connecting notes on both AACR 2 and non-AACR 2 records.

1) Title change only. If the title has changed since the previous edition but the choice of main entry remains the same, make a note on the record for the later edition to link it to the earlier edition. Also make a related work added entry on the record for the later edition to link it to the earlier edition, unless because of the addition of a uniform title, these two are identical. Add neither the note nor the added entry to the record for the earlier edition. Always make the added entry on the record for the later edition according to the AACR 2 choice of entry and form of heading, as well as the AACR 2 form of the title proper or uniform title. (Note that the phrase "choice of main entry remains the same" means that both editions, if cataloged according to AACR 2, would have the same choice of main entry.)

The following pattern is suggested for the note:

for the new edition: Rev. [updated, etc.] ed. of: [Title proper. Edition statement. Date]

2) Choice of entry change. If the choice of main entry has changed since the previous edition, make a note on the record for the later edition to link it to the previous edition. Also, make a related work added entry on the record for the later edition to link it to the earlier edition. Do not make either a note or an added entry on the record for the earlier edition. Always make the added entry in the record for the later edition according to the correct AACR 2 choice of entry and form of heading, as well as form of title proper or uniform title (see LCRI 21.30G).

Use the form of note suggested under 1) above, regardless of whether the title changes or remains the same, and add the first statement of responsibility.

Note that if the new edition has a different choice of entry solely because of the change in cataloging rules (i.e., the earlier edition, if recataloged according to AACR 2, would also have the same choice of entry), do not make a note or an added entry in the record for the new edition.

**7B. Notes**

Generally, give notes in the order in which they are listed here. However, give a particular note first when it has been decided that note is of primary importance.

**7B2. Language of the publication and/or translation.** Make notes on the language of the publication, or the fact that it is a translation or adaptation, unless this is apparent from the rest of the description.

**7B3. Source of title proper.** Make notes on the source of the title proper if it is from a substitute title page.

Binder title
Caption title

**7B4. Changes of and variations in title.** Make notes on titles borne by the item other than the latest title proper.

Title history: Securities law, fraud--SEC rule 10b-5 (1967-Oct.? 1979); Securities fraud and commodities fraud (1979-Dec. 1986)
(earlier titles and their durations are known)

Title history: Trial of medical malpractice cases (1960- )
(original title and date the publication began are known; duration of original earlier title is unknown)

Title history: [Earlier title]_____ (period unknown)
(an earlier title is known; whether it was the only difference, and the duration of the earlier title are unknown)

Slight differences in title
(title has been updated to its latest form which differs only slightly from earlier one(s))

Make notes on titles borne by the publication other than the title proper.

Binder title: Insurance laws

**7B5. Parallel titles and other title information.** Give parallel titles and other title information not recorded in the title and statement of responsibility area if it is considered important for identification.

Vol. 3 has subtitle:

If the subtitle is likely to vary within a period, identify the volume in greater detail.

Vol. 3 (c1986) has subtitle:

**7B6. Statements of responsibility.** Make notes to convey the following information:

a) names of persons or bodies that cannot be transcribed in statements of responsibility if these are considered important for identification

At head of title: [a name not used in the main entry heading and with indeterminate responsibility for the work]

b) statements of responsibility not recorded in the title and statement of responsibility area

"The author of this work is John Charles Newman of the Francis Lefebvre Law Firm"--1983 t.p. verso

c) names of persons or bodies previously associated with the work, or with earlier editions, if they are significant for identification of the work, not too numerous, and not already named in the description

Compiled and edited by: Don Hill and Malcolm Evans (1977-July 1980)

Authors: John Cosgrove McBride and Isidore H. Wachtel (1972-<1983>)

Original title pages, v. 1-2, have statement of responsibility: by Arden H. Rathkopf

If the changes have been numerous, give only the names of persons or bodies connected with the work for a significant period of time, or give the note in general terms only, depending on the situation.

Prior to 1985, authorship of v. 2 varies

7B7. **Edition and history.** Make notes relating to the edition being described or to the bibliographic history of the work.

Replacement title pages carry successive edition statements, e.g., replacement title page received with June 1985 supplementation carries the statement "1985 edition"

Replacement title pages carry successive or inclusive edition statements, e.g., replacement title page dated 1982 has statement: "60. Auflage, Stand 1. Oktober 1981"; replacement title page received with March 1986 supplementation carries statement "14.-65. Auflage, Stand ..."

7B8. **Numbering or chronological designation.** Make notes on numbering if it needs clarification.

Publication is numbered in terms of binders and volumes; statement of holdings reflects binders

7B9. **Publication, distribution, etc.** Make notes on publication, distribution, etc., details when these are not included in the publication, distribution, etc., area and when they are considered important for identification.

Publisher: McGraw-Hill (1960- )

Published: New York : McGraw-Hill (1967- ); Colorado Springs, Colo. : Shepard's of Colorado Springs (<1981>)

Co-publisher's imprint: Littleton, Colo. (originally South Hackensack, N.J.) : F.B. Rothman (1976-1982?)

If the changes are numerous or if a specific listing is not required for the purpose of justifying access points given, give the note in general terms.

Imprint varies

If the date the publication began is ascertained from a reference source, name the source.

Date from: publisher's catalog, 1986
Date from: Legal looseleafs in print, 1984

**7B10. Physical description.** Make notes on important physical details that are not already included in the physical description area.

Originally published in bound format that was kept up to date by pocket supplements and revised volumes

Material of permanent value is removed periodically and bound in separate volumes

**7B11. Accompanying material and supplements.** Give details of supplementary or accompanying material not mentioned in the physical description area or given a separate entry.

Beginning with 1984, selected codes, etc., adopted by the state of Maryland but published by bodies other than the Division of State Documents (e.g., various national codes adopted by Maryland, published by the Buildings Officials & Code Administrators International, etc.) are incorporated into the Code of Maryland regulations by reference only. This means that Maryland does not issue such codes as formal publications of the state of Maryland; instead it uses the publications in the form issued by the non-Maryland agency and affixes a label to the cover of the publication. The label includes the abbreviated title "COMAR" (Code of Maryland regulations), followed by the number of the Title, Chapter, and Section of the part of the Code of Maryland regulations that the publication now constitutes, and the title assigned the publication within the Code of Maryland regulations itself. For example, the National electrical code, published by the National Fire Protection Association and adopted by Maryland, is identified as "COMAR 05.01.03.03, Model performance code," i.e., it is considered to constitute Title 5 (Department of Economic and Community Development), Subtitle 1 (Housing and community development), Chapter 3 (Model performance code), Subsection C of the Code of Maryland regulations

Updates have title: California code of regulations supplement (called California administrative register (1945-1981); California administrative code supplement (1982-1987))

Accompanied by: 9 computer disks (5¼ in.) in container (25 x 23 x 5 cm.)

System requirements for computer disks: IBM PCs or close compatibles; minimum 512K; MS-DOS or PC-DOS 2.0 or higher; one 360K (or more) disk drive and a hard disk; monochrome or color monitor.

**7B12. Series.** Make notes on series data that cannot be given in the series area.

Issued also without series statement

**7B14. Audience.** Make a brief note of the intended audience for, or intellectual level of, a publication if this information is stated within the publication.

For defense attorneys
Directed toward lenders, business credit managers and collection personnel

**7B16. Other formats available.** Make a brief note if the publication is available in formats other than looseleaf.

Also available in annual paperback format

**7B17. Indexes.** Make a note of special indexes and separately issued index volumes.

Includes unnumbered Index/tables volumes (2 v.)
Includes unnumbered Chronology volume
Vol. 7 comprises indexes

**7B18. Contents.** Make a note of the contents of a looseleaf publication, either selectively or fully, if it is considered necessary to show the presence of material not implied by the rest of the description, or to emphasize items of particular importance, or to list the contents of several component parts of a looseleaf service (see 11). When recording titles formally, generally record the title as it appears in the table of contents, unless another source gives a more authoritative account of the data; however, if the title appears on the title page or binder, normally use the title page or binder, in that order of preference.

Contents: v. A. Primary sources -- v. B. BRB decisions, court decisions

Contents: v. 1. Administrator's volume (3 v.) -- v. 2. Attorney's volume (3 v.)

Vols. 1-2 contain the basic concept of trademark law; vols. A-B contain the related statutes and regulations of various nations

Prebound, separately numbered volumes with title Administrative law decisions, containing reports of the Administrative Appeals Tribunal, periodically replace the reports of decisions in the section entitled Administrative law decisions

If the contents are too numerous to list or the structure of the contents changes because the volumes expand, give the note in general terms or omit it altogether.

**7B19. Numbers borne by the publication.** Make notes of important numbers borne by the item other than ISBNs (see 8B3).

ISSN 0159-8422 (Decisions : loose-leaf)

**7B20. Copy being described and library's holdings.** Make notes on any peculiarities or imperfections of the copy being described that are considered to be important. If the library does not hold a complete set of a multipart publication, give details of the library's holdings.[18] Make a temporary note if the library hopes to complete the set.

Library has sections: Treatise, Regulations, and Rulings only
Library lacks section: Mining

**7B21. Currency of information at the time the record is created or updated**

[PREAMBLE. A note, similar to a "Description based on ..." note given on bibliographic records for serials, is of benefit for comparison of data on a bibliographic record vis-à-vis the date in the item in hand as it helps to pinpoint the time limits within which a bibliographic change has occurred. In addition, such information allows for better comprehension of a bibliographic record of material of which another institution has a copy in a different stage of updating. Because the patterns of updating differ from publisher to publisher, the "description based on" statement cannot be presented in a single uniform manner.]

Add an appropriate note indicating the currency of information at the time the record is created or updated.

Description based on: t.p., 1984
Description based on: t.p., 1980; release no. 9, Mar. 1985
Description based on: t.p., v. 1-5, 1980; v. 6, 1984 revision
Description based on: t.p., v. 1-2, 4, 1988; v. 3, 1987

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[18] LC generally gives this information in a local note.

## 8. STANDARD NUMBER AND TERMS OF AVAILABILITY AREA

Contents:
8A. Preliminary
8B. International Standard Book Number
8D. Terms of availability

### 8A. Preliminary rule

#### 8A1. Punctuation

For instructions on the use of spaces before and after prescribed punctuation, see 0E.

Precede this area by a new paragraph.

Precede each repetition of this area by a period-space-dash-space.

Enclose a qualification to the International Standard Book Number (ISBN) in parentheses.

8A2. Sources of information. Take information included in this area from any source. Do not enclose any information in brackets.

### 8B. International Standard Book Number

8B1. Give the International Standard Book Number (ISBN) for the publication being described. Give the number with the agreed abbreviation and with the standard spacing or hyphenation.

Use the qualification "loose-leaf" to identify ISBNs relating to a publication issued in a ring binder (or similar device) that allows pages to be inserted or removed. (Note that in this context "loose-leaf" relates solely to binding/format and does not imply that the publication will be updated by the publisher.)

ISBN 0-86325-016-5 (loose-leaf)

8B2. If a looseleaf service bears two or more ISBN numbers, give the one that applies to the item being described.

Optionally, record more than one number and add a brief qualification. Give a number for a complete service before the number(s) for the part(s). Give the numbers in the order described. (LC follows the option.)

ISBN 0-87215-284-7 (loose-leaf : set)
ISBN 0-87215-230-8 (loose-leaf : v. 1)
ISBN 0-87215-231-6 (loose-leaf : v. 2)

ISBN 0-912862-06-8 (administrator's set : loose-leaf)
ISBN 0-912862-05-X (attorney's set : loose-leaf)

If the supplementation (updating service) has an ISBN separate from the main work, record it, adding the qualifier in terms given by the publisher.

ISBN 0-409-42140-5 (updating service : loose-leaf)

If, however, the supplementation (updating service) has ISBNs that vary from update to update, do not record them.

not: ISBN 0-87215-333-9 (1980 suppl. : loose-leaf)
ISBN 0-87215-609-5 (1981 suppl. : loose-leaf)
ISBN 0-87215-595-1 (1982 suppl. : loose-leaf)

**8B3.** Record any other number, including an ISSN in the note area.

**8D. Terms of availability**

[PREAMBLE. Frequent changes in price do not make it practical to keep this information up to date.]

Do not record the price of a loose-leaf service.

## 9. SUPPLEMENTARY ITEMS

Contents: 9A. Supplementary items described independently
9B. Supplementary items described dependently

**9A.** Describe supplementary items that are to be cataloged separately as separate items. For instructions on the recording of the title proper of supplementary items, the titles proper of which consist of two or more parts, see 1B9.

**9B.** Choose one of the following methods of describing supplementary (including accompanying and related) items described dependently:

a) record the item as accompanying material (see 5E)

b) record the supplementary items in a note (see 7B11)

c) use multilevel description[19]

## 10. ITEMS MADE UP OF SEVERAL TYPES OF MATERIALS

**10A.** This rule applies to items that are made up of two or more components, two or more of which belong to distinct material types (e.g., looseleaf (printed matter) and a cassette).

**10B.** If the looseleaf (printed matter) is the predominant component, describe it in terms of the looseleaf and give details of the subsidiary component(s) as accompanying material following the physical description (see 5E) or in a note (see 7B11).

1 v. (loose-leaf) ; 26 cm. + 1 sound cassette (analog)

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[19] LC does not apply the third method.

## 11. ANALYSIS

(See also AACR 2, 1988 revision, chapter 13)

Contents:
11A. Scope
11B. Analytics of monographic series and multipart monographs
11C. Note area
11D. Added entries

### 11A. Scope

Analysis is the process of preparing a bibliographic record that describes a part or parts of a larger item. The rules here offer various ways of achieving analysis. Analysis by notes is related to the provision found in 7B18, but all the methods are collected here with general guidelines to assist in the selection of one of the means of analysis. Cataloging agencies have their own policies affecting analysis; in particular, a policy predetermining that all component parts of a looseleaf service are to be kept together may override any other consideration.

### 11B. Analytics of monographic series and multipart monographs

If the publication is a part of a monographic series or a multipart monograph and has a title not dependent on that of the comprehensive item, prepare an analytical entry in terms of a complete bibliographic description of the part. Give details of the comprehensive publication in the series area (see 6).

> Corporate political activity / by Thomas Hale Boggs, Jr. and Katharine R. Boyce. -- New York, N.Y. (235 E. 45th St., New York 10017) : Bender, 1984-
> 1 v. (loose-leaf) : ill. ; 30 cm. (Business law monographs ; 8)

### 11C. Note area

If a comprehensive entry for a larger work is made, the entry may contain a display of parts in the note area (normally in the contents note). This technique is the simplest means of analysis; the bibliographic description of the part is usually limited to a citation of title or name and title.

#### 11C1. Topical publications issued in several component parts (subservices)

> [PREAMBLE. Services/reporters comprising several component parts, often in the combination of looseleaf and bound volumes, present and special problem in cataloging, for which there is no ideal solution.
>
> A single bibliographic record representing all the component parts is advantageous to an institution that

acquires the set as a whole (and certainly to its patrons who use the component parts in combination and are thus greatly accommodated by a single classification and the proximity of all parts on the shelf).

On the other hand, because such publications are often also sold as separate parts or in many different combination arrangements, a bibliographic record representing all the component parts is cumbersome to an institution that acquires a single part or a combination of parts but not all the parts. A bibliographic record for one institution's institutional selective parts often will not agree with that of another institution.

A third possibility, the cataloging of each component part as a distinct bibliographic unit classified in its own right negates the very purpose of a looseleaf publication -- to make it possible for a researcher to locate relevant material on a given topic, primary and secondary, in a single source.]

Make a note of the sections of a publication issued in several component parts. Give the volume designation that is found on the section, if one has been used. List component parts in detail sufficient for identification. Optionally, add numeric or chronological designations to parts so identified. See also 7B20.

The reporter contains binders: Current developments; Monographs; State solid waste--Land use, Federal laws; Federal regulations; State water laws; State air laws; Mining; Decisions (later published in bound volumes as Environment reporter. Cases)

The service is divided into five parts: Treatise / by Jacob Mertens, Jr. and others ( v., loose-leaf); Code, current volume (loose-leaf) and bound volumes, 1954-1958- ; Code commentary ( v., loose-leaf) ; Regulations, current volume (loose-leaf) and bound volumes, 1954-1960- ; Rulings, current volume (loose-leaf) and bound volumes, 1954-1957-

## 11C2. Sections with independent numeric or chronological designations

### 11C2.1. Bulletins, newsletters, etc.

[PREAMBLE. Latest developments in a particular field are often reported and analyzed in special sections of a looseleaf. They are typically called bulletin, newsletter, report bulletin, report, etc., and are for the most part indexed in the looseleaf. They carry, also typically, a

numeric or chronological designation of their own. Information of permanent value from these is often later included in the main text and old issues are periodically discarded or transferred, depending on an institution's policy.

Including information regarding the existence of such a section (and giving an appropriate access point) is considered desirable for the following reasons: 1) it helps the patron who, because of the separate numbering system, might not be aware that it constitutes an integral section of the looseleaf (for the most part one of several sections within a binder) and look for it as a separate entity; and 2) it eliminates the possibility of an institution's handling the material both as a section of the looseleaf and as an independent entity.]

Make a note of the inclusion of any separately numbered and separately titled sections. Give an appropriate added entry (entries) to provide access to the special material.

Includes separately numbered section: Report bulletin

Includes separately numbered bulletin: Criminal law advocacy reporter

Alternately, institutions that retain this type of material on a permanent basis may want to prepare a separate bibliographic record.

### 11C3. Pamphlets/paperbacks received as part of looseleaf service subscription

[PREAMBLE. Latest information of temporary or permanent value may be published also in pamphlet or paperback form and distributed to subscribers of a service as part of the subscription. Such publications are keyed to a section of a service or several services of a publisher and are easily identifiable as belonging to a service (they carry also the title of the service and the numbering of a section of the service, usually a supplementary bulletin, to which is added a further distinguishing characteristic such as the words "Extra," "Section 2," etc. (e.g., "Bulletin 35, Extra," "Report bulletin 24. Volume LIII (Section 2)"). Although such materials are often indexed in the service they are unsuitable for filing into the service.

If such a publication is considered of permanent value and is selected for cataloging, the Library of Congress catalogs and classifies it separately from its parent looseleaf service. As such a publication may be issued as

an auxiliary to several looseleaf services of a publisher,[20] no note showing the relationship to a looseleaf service or services is given on the bibliographic record for it.

Because these publications include the title of the parent looseleaf publication(s) and its section, and contain a numbering system as described above, they have the outward appearance of being part of a monographic series. To insure uniform treatment of all such publications, the Library of Congress prepares a "series-like phrase" authority record for each, which states that the publications are not part of a series. In addition, to facilitate the processing of any future publications with similar identifier, a note is added to the authority record giving instructions for handling the material. An example of such a heading and note follows:

Heading for series-like phrase authority record:

Tax ideas. Bulletin.

**Note:**

"A separately numbered section of the looseleaf service 'Tax ideas.' Bulletins issued in looseleaf format are filed as a section of the parent looseleaf. Material published in pamphlet or paperback form issued as a component part of the section, the numbering of which on the pamphlet or paperback is further distinguished by the designation 'Section 2,' if selected for cataloging, is classified separately in LC. In cataloging these, omit any reference of relationship to the parent looseleaf; do not give an added entry for the parent looseleaf."]

Catalog a pamphlet or a paperback constituting part of a looseleaf service subscription as a separate independent entity from the parent looseleaf. Do not show its relationship in a note, do not give an added entry for the parent looseleaf service.

Alternately, libraries seeking options other than the one chosen by the Library of Congress, will do well in considering the several options outlined by Mr. Nicholas Triffin in Law Library Journal, v. 76, no. 1 (winter 1983), the main portion of which is given, with the author's permission, below:

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[20]For instance, The President's Tax Proposals to the Congress for Fairness, Growth, and Simplicity, May 1985 was published by Prentice-Hall as an auxiliary pamphlet to several of its looseleaf services, e.g., Tax Ideas, Federal Tax Guide, and Prentice-Hall Federal Taxes.

"There are probably as many answers to [the question of how to maintain bibliographic control over the various extra and special edition pamphlets that accompany looseleaf services] as there are librarians; so the ones given here should be taken as indicative of the possibilities available, but not as an exhaustive treatise on the subject. The simplest answer, requiring the least discretionary decision making, would probably be to keep all the pamphlets bound together by number and shelved with the "parent" looseleaf. Although this solution requires little thought, it does risk cluttering your library with messy pamphlets, many of which would probably be of little value to your patrons. An equally simple answer, and one favored by some experts on looseleaf services, is to discard all the paper pamphlets after six months. This is, admittedly, rather drastic. Most of the special pamphlets sent with the looseleaf services can be divided into two groups: those that are advance prints of permanent or more authoritative form, and those that contain either esoteric materials that would be difficult to find in a standard small law library (such as the report of a special commission to study securities laws) or editorial materials produced by the publisher (such as the explanation of a recent tax act).

"Materials that belong in the first set I would not catalog at all. I would, however, keep them at least temporarily with the looseleaf set they came with. You could do this in a number of different ways: You could set up a Princeton file after each looseleaf set and keep pamphlets there. You could put a classification number corresponding to the looseleaf set on the pamphlets and just keep them loosely on the shelf. Or you could punch holes in them and bind them together with laces or string so that they don't get too messy. Whatever procedure you use, you probably don't want it to be expensive or permanent because the materials themselves have been determined to be nonpermanent. In fact, you probably should weed through them periodically to remove pamphlets for which the more permanent or authoritative substitutes have been received.

"Materials in the second set present a somewhat greater problem because, although they do not contain material that will be duplicated by other publications, some of the materials in the second set will nevertheless have only evanescent appeal. For instance, the exhaustive explanations that came out at the time of the 1969 Tax Reform Act, though unique to their publishers, are now relatively rarely consulted. When developing a program for the materials in the second category, you must try to determine what they will be consulted for and how they will be found. If they are likely to be consulted primarily to elucidate materials in the looseleaf set, or if they are indexed or referred to in the looseleaf set, you may want to keep them with the set.

"If, on the other hand, they have value independently of the looseleaf set they came with, or if they ar virtually inaccessible through the set, you will want to make alternative arrangements for finding and, perhaps, storing the materials. In this case you would most likely turn to cataloging the materials, which would be virtually the only way to make them accessible. Having cataloged them, you still have a choice in classifying them. You may

either assign every pamphlet a separate classification number and shelve each in its own place on the shelf, or you may collect all the pamphlets for each looseleaf into a binder and classify the binder, or you can collect and bind together all the pamphlets on a particular subject--regardless of the looseleaf sets the pamphlets are associated with--and classify the collection by subject.

"To conclude, the question of pamphlet and looseleaf weeding is one that often comes up and has been discussed before in AALL programs and in prior Questions and Answers columns. In particular, Stanley K. Pearce, librarian at O'Melveny & Myers, has suggested that no pamphlet should be kept unless it is descriptively and subject cataloged. He argued that the benefit of this policy, in addition to ensuring that materials are easily found, is that every decision to retain a pamphlet is necessarily given careful scrutiny since it will entail considerable work down the line."

**11C4. Transfer volumes**

[PREAMBLE. There are three possible methods of cataloging looseleaf publications from which material of a permanent nature (e.g., court decisions) is transferred:

1) Preparing a bibliographic record for the looseleaf as a whole, bringing out the inclusion of transfer material in a note, and if the transfer section has a title of its own (or if the transferred section acquires a title of its own in its transferred/bound stage), providing additional access by means of an added entry.

2) Preparing one bibliographic record for the looseleaf, preparing a second for the transfer material.

3) Preparing a bibliographic record for the transfer material as a serial, considering the looseleaf material to constitute "accompanying material."

The Library of Congress has rejected the third method, considering it to be a bibliographically unsatisfactory one. In the majority of cases it now opts for the first of the three methods on the premise that users of the material are better served if the material is classified together and thereby in close proximity and available as a complete research tool on a given topic. The main drawback of this method is that a library's holdings of the transfer material cannot be shown in the traditional location. The Library of Congress records the holdings of transfer volumes in the shelflist only. Alternately, a note regarding local holdings may be given by institutions which want to use the bibliographic record as a check-in record.]

Make a note of the inclusion of any material of permanent value or of section(s) later transferred.

Material of permanent value is removed periodically and bound in separate volumes

Material of permanent value is transferred from time to time to storage binders

Prebound, separately numbered volumes with title Administrative law decisions, containing reports of decisions of the Administrative Appeals Tribunal, periodically replace the reports and decisions in the section entitled Administrative law decisions

Alternately, prepare a separate bibliographic record for material transferred.

Environment reporter. Cases.
Suggested note: The volumes replace the opinions published in looseleaf format in the "Decisions" binder of Environment reporter

**11D. Added entries**

If a comprehensive entry for a larger work is made that shows the part either in the title and statement of responsibility area or in the note area, an added entry for the part may also be made. The heading for this added entry consists of the part's main entry heading plus uniform title (see AACR 2, 1988 revision, 21.28B). This method is appropriate when direct access to the part is wanted without creating an additional bibliographic record for the part.

For dependent titles, formulate the added entry according to 1B9.

# GLOSSARY

**ACCOMPANYING MATERIAL --**

Material issued with, and intended to be used with, the item being cataloged.

**BINDER TITLE --**

A title that appears on publisher's binder.

**CARTRIDGE --**

A device consisting of either magnetic tape or disk, or a chip, encased in a plastic container.

**CASSETTE --**

A device consisting of permanently encased magnetic tape that winds and rewinds from reel to reel. The container, usually made of plastic, is open on one end to permit insertion of magnetic heads and the drive mechanism; the remainder of the tape is completely enclosed. Standard dimensions of a cassette are 3 7/8 x 2½ inches and the width of the tape is 1/8 inch.

**DISK --**

A circular, flat device with one or both sides coated with a magnetic material on which information or instructions are written or stored. Disks for computers are formatted into tracts and sectors, with each sector having the same fixed length or capacity to store information. Disks are direct access storage devices in that the computer can reach the desired information without having to scan all the information that precedes it.

**EXPANDED/SPLIT VOLUME --**

A bibliographic unit whose physical capacity increases to accommodate additional material, usually revisions and additions. The increased capacity is usually in the form of additional physical volumes (binders). If a unit that is expanded is also part of a numbered multipart item or monographic series for which numbering has already been assigned, the numbering is adjusted to reflect any expansion. The method of adjusting the numbering varies slightly among publishers. For example, a volume originally numbered "volume 2" of a set may, when later expanded into two volumes, then be numbered "volume 2" and "volume 2A" or "volume 2A" and "volume 2B."

**LOOSELEAF** —

A mode of publication in which the material is published on separate, usually perforated pages or booklets in special binders; the pages or booklets can be easily inserted, removed, and substituted. This physical feature allows a publisher to update the text through continuing editing, introducing what is new, and removing what is superseded.

**LOOSELEAF FORMAT** —

Any material issued in binders similar to those used for the looseleaf mode but not intended to be updated by the publisher.

Publications in this category may be monographic or they may be serials.

**LOOSELEAF FOR UPDATING** —

See Looseleaf.

**SPINE TITLE** —

A title that appears on the spine of a publisher's binder.

**SPLIT VOLUME** —

See Expanded volume

**SUBSERVICE** —

A component part of a looseleaf service, usually having its own numeric or chronological designation and in some cases available also on a separate subscription.

**TRANSFER VOLUME** —

A bibliographic unit containing material originally issued as a section or binder of a looseleaf service. To retain the material permanently, it is transferred from the looseleaf mode at the end of the year or from time to time by one of the following methods:

1) the material is reissued by the publisher in bound form and sent to the subscriber as part of a subscription or made available for separate purchase;

2) the material is transferred from the original looseleaf mode to permanent binders supplied by the publisher;

3) the material is removed from the looseleaf mode and is transferred to permanent binders or bound separately by the subscriber.

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